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ABSTRACT

Key concepts for building a needs assessment information system are discussed (i.e., need, needs assessment, management, and information system). For the areas of basic or general education, recreation/leisure, and work, a chart illustrates kinds of needs (i.e., normative, felt, expressed, comparative, and anticipated). Three aspects of needs assessment most critical to a postsecondary institution are: learner assessment, community assessment, and provider assessment. After establishing objectives and defining the audience for a needs-assessment study, the question of focus arises (who decides that a need exists, who has needs, what needs will be assessed, and what information is required). In addition to considering each of these questions, a classification structure for identifying needs is presented. The structure is a matrix that can focus on the following need areas for learners, the community, and providers: description, purposes, content, methods, financial resources, physical resources, human resources, time resources, information resources, support functions, and outcomes. Appendices provide three instruments to assess the needs of: potential student clients for a given institution; community agencies and organizations; and the capabilities and resources for a given postsecondary institution. (SW)

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Needs-Assessment Information

– 1977

by

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and

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Foreward

This paper discusses key concepts for building a needs assessment information system and is intended to help answer the following questions: Who determines that a need exists? Whose needs will be assessed? What needs will be assessed? What information about needs is required for the assessment" The paper has been extracted from the Needs Assessment Information System document that was prepared by Drs. G. Roger Sell and JoAn Segal in August, 1977, and we believe it can be a valuable resource to persons responsible for planning and conducting community impact studies.

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I. Conceptual Framework for A Needs Assessment Information System

This section presents the central concepts that underlie the design of a needs assessment information system (NAIS). These concepts are: need, needs assessment, management, and information system.

Need

McMahon (1970), Lenning (1978), and Burton and Merrill (1977) and Witkin (1975) have summarized the literature of needs and the definitions associated with the term. Although one concept of need, exemplified by Maslow (1970), conceives of it as a constantly motivating force in the lives of all people, moving them to increasingly advanced levels in a hierarchy of needs, most users of the term are speaking of a gap--a difference between some existing state and some ideal or satisfactory state. Lenning tries to incorporate both of these concepts in his definition:

> A need is a necessary or desirable condition, state or situation--whether it be a needed end result that is actuality (met need) or a discrepancy that needs to be closed between a current or projected actuality and a needed end result (unmet need)--as judged by a relevant person or group using multiple objective criteria that have been agreed upon. (p.20)

The problem with assessing need is that we are usually talking about something other than a need--a want, for instance, or a demand. Bradshaw's four kinds of needs address this problem. He identified

1. Normative needs: Present when an individual or group has less than some established standard.
2. Felt need: Synonymous with want.

3. Expressed need: Synonymous with demand.

4. Comparative need: Exists when a person or group which is similar to another person or group is failing to receive some good or service which the other group is receiving.

To these four, Burton and Merrill (1977) have added:

5. Anticipated need. Having to do with the projected demands of the future.

All these needs are of the gap or discrepancy type. They exist because there is a gap between a present and an ideal (or satisfactory) condition. Examples of the five kinds of needs are shown in Table 1.

Educational Need

Monette (1977) defines an educational need as one which is "capable of being satisfied through a learning experience which can provide appropriate knowledge, skills, or attitudes." (p. 119) Dave (1976) refers to these as learning needs. The institutional philosophy will determine what are considered valid educational needs in practice. This will also determine which information is required in the assessment of needs.

(See Dave, 1976, and Williams, 1978, for a discussion of the relationship between societal needs and educational needs.)

Needs Assessment

According to Peat, Marwick & Mitchell (1978);

> needs assessment includes all those formal and informal activities that an organization uses to investigate potential markets for particular programs before offering the programs. Needs assessment may be based on data that are systematically collected, or it may be quite informal, as when a program director, with little or no consultation, judges that a particular program will attract participants. (p. III-5)

Table 1
An Illustration of Kinds of Needs

KIND OF NEED \ AREA OF NEED	BASIC OR GENERAL EDUCATION	RECREATION/LEISURE	OCCUPATIONAL
Normative	Education level below norm for region, specific group, country, etc.	Fitness level below norm for age, sex, etc.	Income level below poverty level, or below median for country, region, locality, specific group.
Felt	Person would like to be expert in some field. Person wants a certain academic credential.	Person would like to play the piano. Person wants to learn a foreign language. Person wishes to be able to sew.	Person wants "a better job." Person wants "a higher salary." Person wants "more job satisfaction."
Expressed	Person takes (GED) exam. Person borrows self-help texts in library to prepare for Graduate Record Exam. Person applies to institution for entrance into program.	Person calls a music store to ask about piano lessons. Person enrolls in Free School Spanish course. Person sends for booklet: Learn to Sew at Home.	Person signs up for vocational education course. Person enrolls in correspondence course on job-related topic. Person sends in coupon for information regarding an advertised proprietary school program.
Comparative	Others in same profession have higher degree. Friends, spouse are experts.	Neighbor can play piano. Friends all know how to sew.	Blacks have jobs of lower status than whites. Women earn less than men. Fewer minorities in management positions.
Anticipated	Upcoming licensing standards will impose necessity for credential. Possible career change might necessitate new expertise.	Person might take a trip to Europe some day and need language. Future move to new home might require sewing spreads, drapes.	Job obsolescence will mean necessary retraining. Automation will put x people out of work. New technology will require certain skills.

Bowers and Associates (1976) describe nine steps in needs assessment: identifying people and roles; speaking the same language; stating concerns and goals; finding the needs; measuring and ranking the needs; setting priorities; determining the feasibility of meeting the needs; planning the program; and continuous reassessment. (p. 7)

Lenning's (1977) definition of needs assessment is:

> an objective and systematic process for identifying and assessing specific types of met and unmet needs of an individual, group, organization, institution, community, or society. It provides analytic information to selected educational decision makers that will be of assistance to them in making needed decisions for an educational course, program, institution, or educational system of institutions. (p. 43)

Of all the messages passed on to us in telephone interviews and--to a somewhat lesser extent--in the literature, this was the most important: needs assessment is a process, not a product. It is not a synonym for survey, but involves many methods going on constantly and simultaneously. Needs are constantly changing; people and the society are in flux, so any survey or other method which identifies needs at a given time can be misleading even a short while later. Needs assessment must therefore be thought of as a process of keeping in tune with the institution's publics. It involves communication between the community and the institution. The process itself is dynamic and in constant flux, because the institution, the community, and the individual learners are all changing all the time. Not only are they changing as adult development or organizational growth take place, they are changing in response to the changes in one another and the influences they mutually exert upon each other. Our definition of needs assessment is: a process of identifying, understanding, and responding to needs.

Kempfer (quoted in McMahon, 1970) concluded that the best approach to assessing needs is close contact with prospective clients, use of all pertinent information, and a combination of needs assessment methods. Boyer (1976) suggests continuous reassessment as the last step in the needs assessment process, thus implying a cyclical activity. In his section on pre-operational planning, development strategy, Medsker (1975) advocates assessing institutional options, including resources, structure, and institutional climate; external environmental conditions, including attitudes and policies of significant agencies such as state coordinating boards and legislative bodies; potential client needs; and programs offered by other institutions.

Aspects of Needs Assessment

There are three aspects of needs assessment most critical to a postsecondary education institution. These aspects are: learner assessment, community assessment, and provider assessment.

1. Learner Assessment. Learners are those for whom learning activities are offered. Synonyms for learners are students, enrollees, participants, clients, and target audiences. From a provider perspective, three groups of learners should be considered in the assessment of learner needs: former learners not presently served; present learners (clients); and potential learners (clients). Potential learners include former and present learners, as well as those not yet served.

Figure 1 shows the components for a learner needs assessment. Learner needs are individual deficiencies (problems) that could be satisfied through a learning experience. Learner needs may be active (conscious) or latent

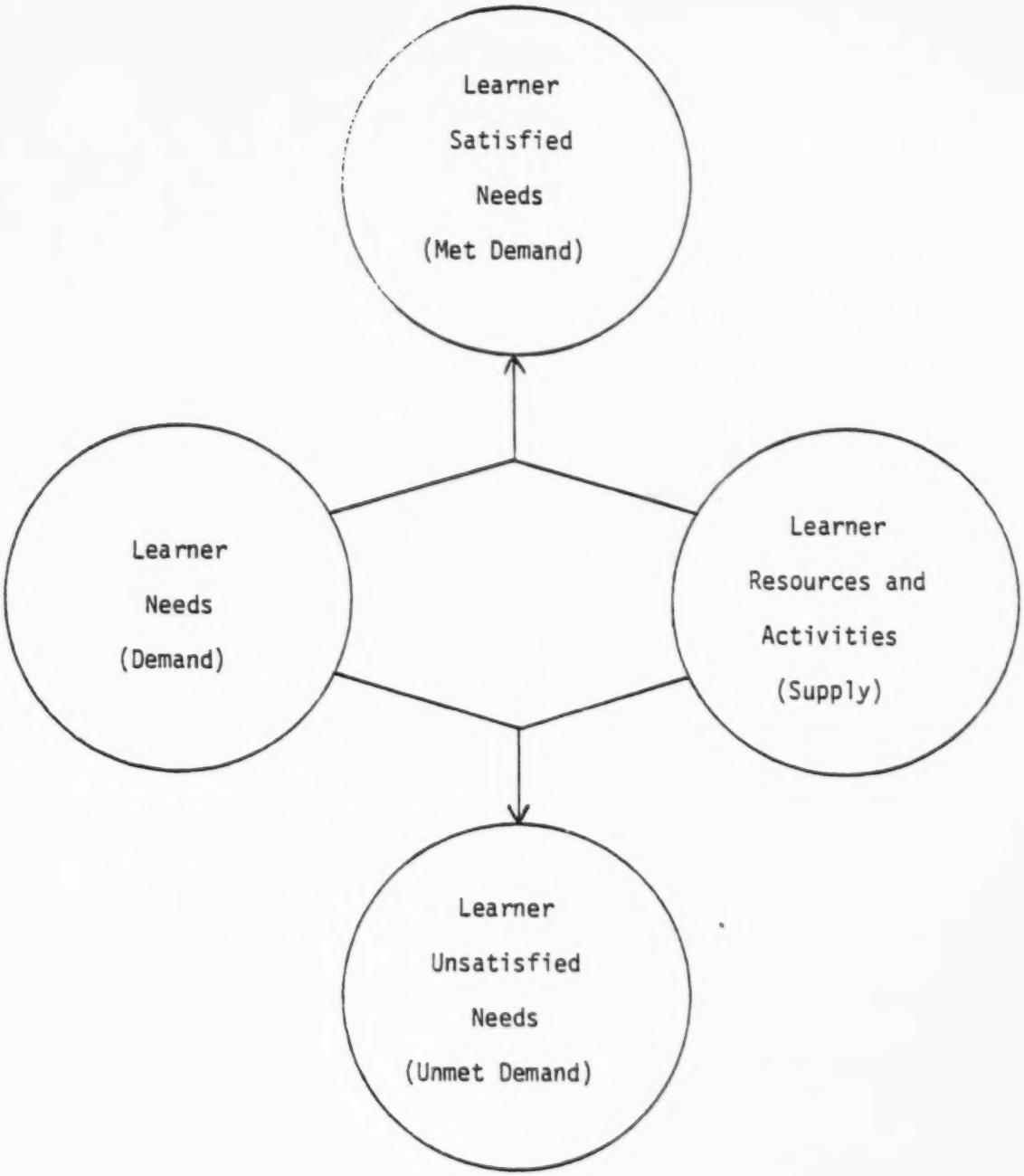

Figure 1

Components for an Assessment of Learner Needs

(subconscious, unconscious). The assessment of learner needs may focus on one individual learner or a group of learners. Learner resources and activities interact with learner needs in determining whether needs are satisfied (met demand) or not satisfied (unmet demand). Learner resources and activities represent the individual supply for meeting demand. Learner resources include financial resources, time resources, physical resources, informational resources, and human resources (learning capabilities). Each of these learner resources can influence the demand for educational services and programs. Learner activities include those that are self-provided as well as those that are provided by other persons, groups, and institutions. A learner satisfied need (met demand) results when learner resources and activities match learner needs; a learner unsatisfied need (unmet demand) results when learner needs are not matched by the resources and activities of the learner. While satisfied needs may in turn stimulate the "need" for more learning activities,* the focus of the learner assessment should be on the identification and description of unsatisfied needs.

2. Community Assessment. A community is a societal context within which learning activities occur. The term "community" is used most frequently to mean a geographical location defined on the basis of political boundaries, population density, economic activity, and/or natural resources. Within a geographical-based community, or cutting across geographical-based communities, interest-based communities can be identified. The members of interest-based communities belong to organizations whose primary purposes are recreational, cultural, religious, educational, governmental, private enterprises, etc. A

*This is equivalent to saying that those with higher levels of education want more education, as do those who have had satisfying educational experiences.

third meaning of the term "community" refers to a group defined on the basis of personal traits, e.g., sex, age, education level, marital status, racial/ethnic group, etc. A "trait-based" community intersects both geographical-based and interest-based communities. From a provider perspective, each of these three types of communities is important for the identification and description of learners, as well as for the identification and description of alternative, cooperative, and competing providers of learning activities. In short, a community provides a context within which a provider can assess the supply of and demand for learning activities.

Figure 2 shows the components for a community needs assessment. These components are parallel to those for a learner needs assessment. Community needs are group deficiencies (problems) that potentially can be satisfied through a learning experience. As with learner needs, community needs can be active or latent. While individual learner and provider needs contribute to (are indicators of) community needs, when summed they do not equal community needs because community needs are greater than the sum of the parts. Community resources and activities interact with community needs in determining whether the community needs are satisfied or not. Community resources include human, informational, physical, time, and financial resources. As with learners, each of these community resources influences the demand for educational programs and services. Community activities include all learning activities that are provided in the community. These activities include those offered by providers who are located within the community, as well as those who are located outside the community. A community satisfied need (met demand) results when community resources and activities match community needs; a community unsatisfied need (unmet demand) results when community needs are not matched

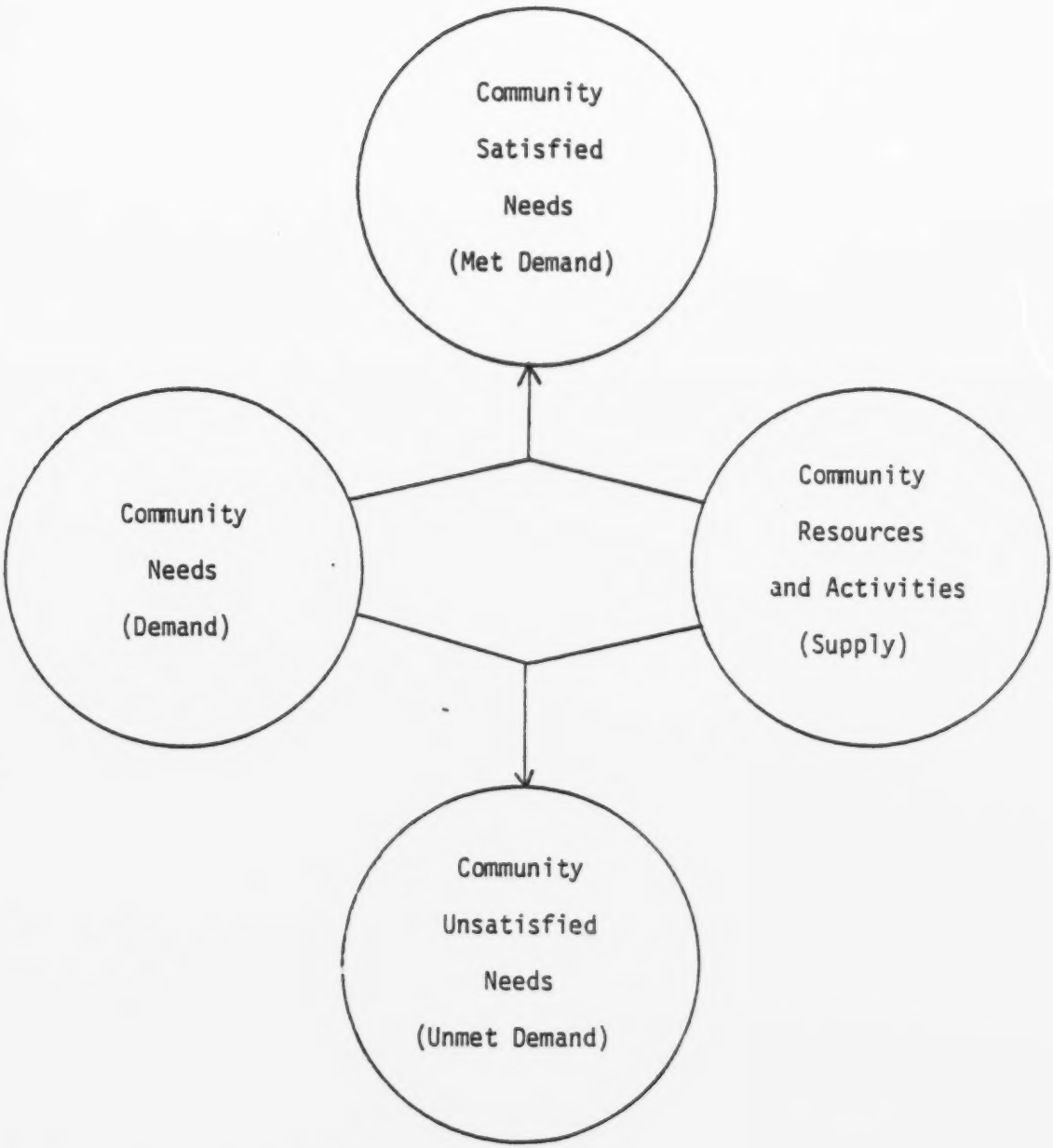

Figure 2

Components for an Assessment of Community Needs

by the resources and activities of the community. As with learner needs, satisfied community needs may stimulate the need for more learning activities. The focus of community assessment, however, should be on the identification and description of unsatisfied needs.

3. Provider Assessment. A provider is a person, group, or organization by whom learning activities are offered. For purposes of this section, only organizational providers are discussed. (Note: A learner may serve as his or her own provider.) In addition, providers are distinguished from sponsors; a sponsor supports learning activities through endorsement and/or financial resources. The provider of a learning activity also may be its sponsor. In the case of contracted services, the contractor would be the provider and the contracting agency would be the sponsor. Within a provider organization, the total organizational entity (e.g., college, university) would be identified as the parent organization through which the activity is provided and the organization sub-unit (e.g., division, department) providing the activity would be identified as the specific provider. Organizational providers include--in addition to schools, colleges, and universities--business and industrial organizations, labor unions, park and recreation departments, governmental agencies (Federal, State, county, local), religious organizations, libraries, museums, professional and trade associations, voluntary organizations, the military, mass media organizations, and a variety of social and community organizations. These organizations not only contribute to the supply of educational programs and services, but also create demands for programs and services.

Figure 3 shows the components for an organizational provider assessment. The organization's mission, role, and scope of activities is the basic structure within which learning activities are provided. An organization's philosophy and general purpose is expressed in its mission statement. The role of the organization is defined in relation to other providers, and organizational scope refers to the kind and extent of activities which an organization undertakes. The consideration of mission, role, and scope can apply to an organization as a total entity as well as to a sub-unit of a parent organization (e.g., a department within a division, a division with an organization, an organization within a system). Organizational constraints are learners, inhibitors, and controls within which an organization functions. Some organizational constraints are a matter of policy (e.g., organization X has a defined service area or can offer only noncredit courses); other organizational constraints are procedural or structural (e.g., in order to offer a certain program, an organization must receive approval from X committee or X administrator). Although difficult to define, another kind of constraint is conceptual, that is, a mind set that does not permit alternative perspectives or options. These kinds of constraints impact on the programs and services that an organization can offer. Organizational resources are the human, financial, physical, time, and informational resources of the provider. In combination, an organization's mission/role/scope, constraints, and resources determine the educational programs and services it provides.

Table 2 brings together the three aspects of needs assessment and indicates relationships among them.

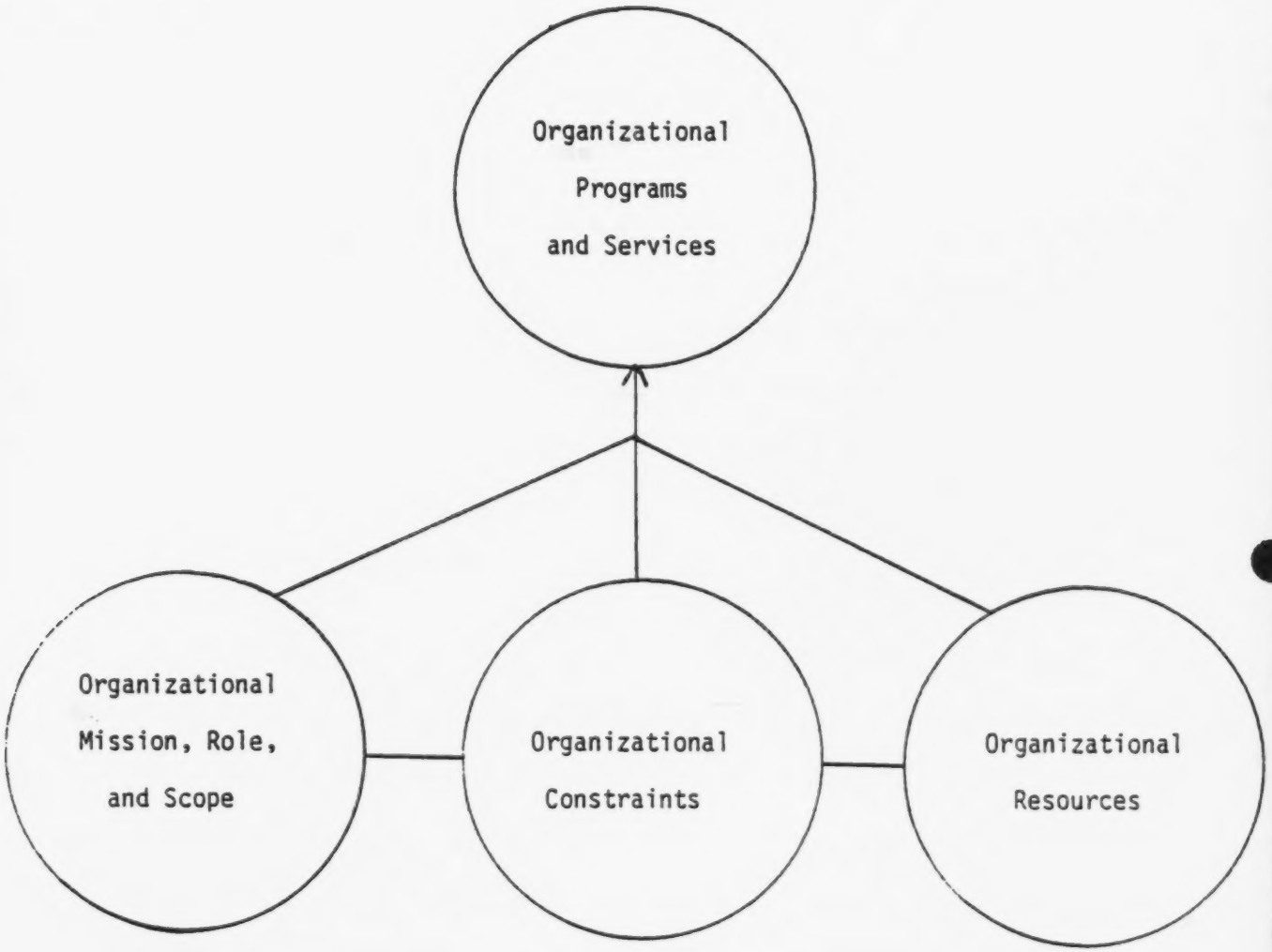

Figure 3

Components for an Assessment of Organizational Providers

Table 2

Relationships Among the Three
Aspects of Needs Assessment

Target of Assessment	Demand Factors	Supply Factors
Learners	Learner needs, satisfied needs, and unsatisfied needs	Learners resources and activities
Communities (including all learners and providers	Community needs, satisfied needs, and unsatisfied needs	Community resources and activities
Providers	(Provider needs)	Provider programs and services (mission/role/ scope; constraints; resources)

An innovative needs assessment process which is ongoing is carried out by the American Management Association. They convene semiannually fourteen councils of thirty members each. Each council is composed of leading practitioners in one of the interest areas of the Association. Their task at their summer and winter meetings is to discuss what is happening in their professions--what is new since they spoke last, what new demands are being made on them, what changes are taking place, what they are doing more and what less. As the association members listen to these discussions, they become aware of trends which are likely to be of importance to the general membership. These ideas form an important part of the input into the decision making which underlies the offering of some fifty seminars each week by the Association.

A technique described by McMahon (1970) involves the story of a county agent who had a special method for finding out about community needs. "He would go into a rural community and seat himself outside the general store. He was a confirmed whittler, and he would take out his pocketknife and a block of wood, and he would sit there and whittle. As he whittled, he would listen. At the end of the day, it is alleged, he would know all that was necessary to know about the needs of that community." (p. 38)

While the authors do not advocate taking up whittling as a hobby, they do suggest that sensitivity to what is going on in the community involves being out in it with one's ears and eyes open as a sensitive and active community participant. We see needs assessment as a communication system linking the institution with the community and the people in it.

Within the context of your institution, what meaning does needs assessment have to you?

What activities are you now involved in which you can now identify as being part of needs assessment?

Are there activities regularly carried out by your institutions which could be broadly interpreted as needs assessment or which provide the potential for needs assessment information gathering? (e.g., participating in community activities, liaison with state and local government agencies; inter-institutional cooperation).

II. Focusing on Needs-Assessment Information

After establishing objectives and defining the audience for a needs-assessment study, the question of focus arises. Focus refers to the center of attention of the needs assessment: the needs themselves. Who determines that a need exists? Whose needs? What needs will be "assessed"? What information about needs is required for the assessment?

In this paper, we address these questions and present a classification structure for identifying needs. In connection with this classification structure, we suggest some areas in which specific information about needs may be sought. Then we identify some sample questions in these areas which come from instruments collected during this project.

Who determines need?

An all-important question deals with the judgment that a need exists and/or that it ought to be responded to. Clearly, this is a value judgment. The problem, according to McMahon (1970), is that, all too often, it has been the educator who has determined needs by deciding what offerings the institution will make to the public. "Determination of need," he says, "requires a meeting of the minds between educator and prospective client." (p.22)

In describing how learning needs should be assessed, Dave (1976) asks: "What should be the role of the local community, national authorities,

specialists (e.g., in agriculture) and others in determining learning needs of a particular rural area and especially the poorer pockets within the area?" (p. 13)

Peat, Marwick, & Mitchell (1978) assert: "It is providers' perceptions of demand, vs. actual demand, that determines supply." (p. iii) and "most institutions rely on the personal judgments of individual staff persons and informed conversations among staff as the basis for program decisions." (p. iv)

Boyle and Jahns, in the 1970 AEA Handbook, advise the adult educator to determine needs on the basis of information about potential learners, contemporary social and economic environment, and subject matter.

It is important to keep in mind that needs expressed or felt by learners, community representatives and institutional spokesmen are an important source of information for institutions desiring to plan a program, but that filters will constantly intervene between the expressed needs and the educational offerings the institution will be able to make. The question of who determines the actual need and the institutional response to that need must be faced in order to make an honest assessment of the decision-making process.

Whose needs?

Three targets of assessment are identified as possible foci for needs assessment. These are learners, providers and communities. Learners are the participants in learning activities. The learners' perspective is not singular. Different learners will look at learning activities in different ways; the concept of need can be expected to differ from one learner to another.

Providers are the persons, groups, organizations, and institutions that offer learning activities for adults. Like that of learners, the providers' perspective is not a singular one. Needs can appear very differently where the provider is the learner himself/herself, a person other than the learner, an informal group, or an educational institution; or, whether learning activities are the primary, secondary, or tertiary purpose of the provider.

Communities are groups defined by some common attribute of their members. The communities' perspective offers multiple ways of looking at needs: from the viewpoint of groups defined on the basis of political boundaries (e.g., towns, cities, counties, states, regions, nations); the viewpoint of demographic-based groups (e.g., rural, urban); or, from the viewpoint of interest-based groups (e.g., private enterprise, unions, professional associations, government, or public services). The community perspectives offer alternative ways in which the needs of learners and providers can be described.

Each of these perspectives can also be viewed as a target for assessment. In other words, in assessing the needs area, "purposes," one would have to target the assessment toward learners or providers or the community, as each may have a different need. A learner's need might be represented by his/her motivation.

The provider's need would be influenced by the role, scope, and mission of the institution. The community's need might be based on social conditions needing improvement.

What needs?

The obvious question is not always the first one to be asked. People have all kinds of needs about which it might be interesting to gather information, but not all of them are pertinent to the postsecondary education community and to the particular institution trying to learn what it should provide to adult learners.

The purposes of the institution will, of course, determine the specific needs to be addressed. The perception of the institutional function, the constraints imposed upon the institution from influences outside it (such as accrediting agencies), the institutional climate for change, and the institution's flexibility, all have an impact on the kinds of needs about which the institution will want information.

Although it has become fashionable to insist that postsecondary education is learner-centered, the actuality of the matter may not bear out this claim. We suggest that, in order to better serve the public, administrators must assess the needs of learners, of the community, and of their own institutions. NCHEMS Handbook of Terminology for Classifying and Describing the Learning Activities of Adults (1978) provides a framework for the detailed description of learners (pp. V3 - V4). Many existing surveys have examined learner populations to ascertain the motivations, felt needs, and preferences of adults.

The by-now classic work of Johnstone and Rivera (1965), the Carp, Peterson, & Roelfs (1973) study, and the surveys conducted by states, such as Colorado (1975) are all of this type. Johnson (1967) differentiates among the training needs of the individual, the group, and the organization in his article in the ASTD Handbook. If the learner is to be the focus of adult education programs, understanding learners' needs is of high importance for institutions.

The needs of a community can be seen as the sum of the needs of the learners in it, or as being more than that. McMahon (1970) argues that communities have needs greater than those obtained by adding up individual needs. If one takes a systems approach to community, it is clear that individual needs are an important subsystem of community needs, but cannot be aggregated simply to describe adequately what the needs of the community are. The NCHEMS Handbook (1978) gives detailed descriptors for communities (p. V-3).

An important component of any community is its institutional structure. Within the community, individuals are organized into institutions, organizations, groups, and associations of many kinds. Many individuals belong to more than one such institution. The needs of these institutions are of great importance in assessing community needs. In addition, many of these institutions are themselves providers of educational services to their members and to the community at large. A needs assessment must take the institutional components of the community into consideration.

The needs of the institution performing the assessment must also be taken into account. This means having a clear understanding of the institution--

its goals, purposes, potential for service, facilities, and financial, human, and informational resources. Whether or not it is made explicit, the question of institutional need is at the heart of the assessment any institution makes. Does the institution need to increase its student body? Does it have facilities which are going to waste, and which it needs to find use for? Does it have faculty members it doesn't want to lose, but who are under-utilized? Does it have a mandate from an accrediting institution or some funding body to "do a needs assessment"? Is it undergoing an administrative and philosophical crisis, leading it to reconsider its traditional approach to providing education for adults? A set of descriptors for institutions (providers) is included in the NCHEMS Handbook (1978) (p. V-3 - V-4).

What needs information is required?

The Handbook of Terminology for Classifying and Describing the Learning Activities of Adults identifies the following categories of information, which can be used in identifying needs. Each of these can be related to Learners, Providers, and Communities.

Description includes identification and characteristics.

Purposes are the aims toward which a learning activity is directed. A learner's purpose is an important component of his/her educational needs. Communities and institutions also have purposes which must be understood in order to assess needs.

Content represents the subject matter and subject areas that are reflected in learning activities for adults.

Methods are the ways in which the teaching and learning of adults take place.

Financial resources are the funds needed by learners, communities, and providers in connection with educational activities.

Physical resources include facilities and equipment needed for educational activities.

Human resources are the persons involved in offering learning activities.

Time resources include aspects of time relating to educational activity.

Information resources involve needed information concerning educational activities.

Support Functions are the activities that enable and support activities for teaching and learning. They include governance and policy setting, management, guidance and counseling, testing and placement, research and evaluation, and design and production of learning resources and logistical services.

Outcomes are the planned and unplanned (or intended and unintended) results from a learning activity.

Table 1 is a representation of needs assessment as a matrix, where needs areas are matched with targets of assessment to identify specific items of information about needs.

As an example of the use of the matrix, we have identified each cell by a combination of letters indicating, first, the initial letter of the name of the row (L, C, or P), and second the initial letter (or letters) of the name of the column (D, P, C, M, FR, PR, HR, TR, IR, SF, O). The cell at the

NEEDS AREAS / TARGETS OF ASSESSMENT	DESCRIPTION	PURPOSES	CONTENT	METHODS	FINANCIAL RESOURCES	PHYSICAL RESOURCES	HUMAN RESOURCES	TIME RESOURCES	INFORMATION RESOURCES	SUPPORT FUNCTIONS	OUTCOMES
LEARNERS	Identification and Characteristics	Basic educ. Occupational Family Civic Leisure and recreation Self-devel. Social devel. Credit and awards	Preferred subject matter	Learning style Individual and Group Methods	Income data: amts., sources. Amount willing to spend: per year, total, etc.	Sites Equipment Collection Supplies	Identification and Characteristics	Time frame Frequency Duration	Awareness of institution; Knowledge of availability costs, etc.	Services desired and desirable	See Purposes
COMMUNITY	Identification and Characteristics	Betterment of social conditions	Subjects needed by groups; Subjects offered by institutions	How does community solve problems; Methods offered by institutions[a] Individual & Group Methods	Finances of community; organiz'ns; Economic trends Employers	Needs for kinds of facilities Facility sharing Availability	Availability[a] Demographic information Government employees Human resources of business, etc.	When are learning opportunities offered?[a] Work time frame for most workers	Background information for planning Clearinghouse of community activities MIS	Policy setting Governance Management Logistical services	Social improvement Directory See Purposes
PROVIDERS	Identification and Characteristics	Goals and Objectives; Mission, Scope, and Role	Subjects offered[a] Universe of possible offerings Others' offerings Desired subjects	Presently used; Desired; Universe of possibilities Individual, Group Methods	Income: Amounts, Sources Expenses: Amounts, Purposes	Inventory[a] Facility needs	How many?[a] What kind?[a] What others needed?	When are learning opportunities offered?[a] Academic calendar	MIS Information regarding self, other institutions ENTIRE CHART!	Policy setting Governance Management Testing & Placement Research & Evaluation Guidance & Counseling Learning resrcs Logistics	See Purposes

[a]Supply (vs. demand) data

TABLE 1. MATRIX OF NEEDS ASSESSMENT CATEGORIES OF INFORMATION

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upper left corner would therefore be LD: descriptive information about learners.

To examine the usefulness of the matrix, let us assume that we wish to focus on learner needs in the area of content. We are therefore interested in cell LC. Some possible learner needs we might want information about concern subjects for which learners perceive a need or express a preference.

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Appendix:

Sample "Draft" Instruments

SAMPLE: INSTRUMENT A

POTENTIAL STUDENT NEEDS ASSESSMENT

PURPOSE: To Assess the Needs of Potential Student Clients for a Given Institution

INSTRUCTIONS:

Specific directions are given for completing many of the questions in this questionnaire. Where no directions are given, please circle the number or letter of the most appropriate response, such as in the sample question below.

Sample.

A Are you currently married?

0 Yes

(1) No

If you are not currently married, you would circle the number 1.

(1.) What is your sex?

0 Female

1 Male

(2.) How do you describe yourself? *Circle one.*

0 American Indian or Alaskan Native

1 Asian, Pacific Islander, or Filipino

2 Black or Afro-American

3 Hispanic, Chicano, or Spanish-speaking American

4 White or Caucasian

5 Other _____

(3.) How old are you?

0 Under 18

1 18 to 22 years

2 23 to 25 years

3 26 to 30 years

4 31 to 40 years

5 41 to 50 years

6 51 to 60 years

7 61 years or more

(4.) Are you currently married?

0 Yes

1 No

(5) Do you feel that you have a permanent handicap? *Circle all that apply.*

0 No

1 Yes, restricted mobility

2 Yes, restricted hearing

3 Yes, restricted vision

4 Yes, but I prefer not to record it on this form

5 Other .....

(6) What is the Postal Service Zip code at the place you consider to be your current residence?

(7) The following list give the reasons why people would seek out education or training after high school. Which would apply to you?

Academic Reasons

A To increase my knowledge and understanding in an academic field

B To obtain a certificate or degree

C To complete courses necessary to transfer to another educational institution

D Other .....

Career-Preparation Reasons

L To discover my career interests

F To formulate long-term career plans and/or goals

G To prepare for a new career

H Other _____

Job or Career-Improvement Reasons

I To improve my knowledge, technical skills, and/or competencies required for my job or career

J To increase my chances for a raise and/or promotion

K Other _____

Social- and Cultural-Participation Reasons

L To become actively involved in student life and campus activities

M To increase my participation in cultural and social events

N To meet people

O Other _____

Personal-Development and Enrichment Reasons

P To increase my self-confidence

Q To improve my leadership skills

R To improve my ability to get along with others

S To learn skills that will enrich my daily life or make me a more complete person

T To develop my ability to be independent, self-reliant, and adaptable

U Other _____

Family Reasons

1 To be a better parent
2 To deal with brothers and sisters better
3 To learn how to solve family problems
4 To cope with aging parents
5 To manage home finances better
6 To be a better homemaker
7 To improve your marriage
8 Other _____

Civic Reasons

9 To learn more about how to solve community problems
10 To learn more about community affairs and public issues
11 To contribute to the government of your town, state, or country
12 Other _____

Leasure or Recreational Reasons

13 To improve skill in a sport
14 To learn about a hobby, such as stamp or coin collecting
15 To learn to play a musical instrument
16 To acquire skill in dancing or acting
17 To appreciate art, literature, or music more intelligently
18 Other _____

(8) From the list of reasons why people might seek education or training after high school in Question (7) please select the three that you would think are more important and enter their codes below. For example, if you think that the most important reason would be "to obtain a degree or certificate," enter the letter B in the first box.

Most Important [ ] Second Most Important [ ] Third Most Important [ ]

(9) The following list gives some of the subject areas that people study after high school. Please check all of those which are areas that you think you might like to take.

(list to come)

(10) From this list of subject areas please select the three that are the most interesting to you and enter their codes below. For example, if you think that the thing you would most be interested in studying would be "French language or literature" enter the letter F in the first box

Most Interesting [ ] Second most Interesting [ ] Third most Interesting [ ]

(11) If you went back to school, when would you most prefer to take classes?

0 Weekday mornings
1 Weekday afternoons
2 Weekday evenings
3 Anytime during the week
4 Anytime during the weekend
5 No preference

(12) If you were to go back to school, at what season of the year would you want to take classes

0 Spring
1 Summer
2 Fall
3 Winter
4 Year-round
5 Not year-round but no preference

(13) How often would you be able to attend a session of a class or other learning activity

0 daily
1 four times a week
2 three times a week
3 two times a week
4 once a week
5 twice a month
6 once a month
7 Other _____

(14) Some people prefer intensive time arrangements for classes while others prefer to have them spread over a longer period. Would you be interested in courses or learning activities that required you to attend

0 all day Saturday for six weeks
1 two or three weekends
2 all day for two or three weeks continuously
3 all day and evening for one or two weeks continuously
4 all day and evening for three or four days, including one weekend
5 Other _____

(15) For how long a period of time would you like to continue one learning activity

0 two weeks
1 one month
2 six weeks
3 two months
4 ten weeks
5 three months
6 one quarter
7 one semester
8 one year
9 Other _____

16 Some people have definate preferences for the way in which they learn. Which of the following would be most preferable to you?

A Independent study, for example correspondence, home study

B Directed study, such as tutorial instruction

C Directed experiental learning, for example apprenticeships, on-the-job training

D Self-directed learning, such as do-it-yourself projects

E Classes

F Small group meetings such as workshops, seminars, institutes

G Large group meetings, for example conferences, conventions, or lectures

H Demonstrations

I Trips or tours

J Action projects such as working with a committee to solve a community problem, involving students in projects in the community, etc.

17 How far would you be able to travel to take part in a learning activity which was scheduled on a regular, recurring basis (like once a week)?

1 Less than a mile

2 One to five miles

3 Six to ten miles

4 Eleven to twenty miles

5 More than twenty miles

18 In what kind of facility would you prefer to take a learning activity?

1 in a classroom

2 in an informal, seminar-type room

3 in a library

4 outdoors

5 where you work

6 at home

7 Other _____

19 If a learning activity required you to live away from home would you participate?

1 Yes, I would prefer to live away from home while learning

2 Yes, I would participate although I would not prefer to live away from home

3 No

20 Which of the following ways of learning would you prefer to learn

1 In a situation where there was a live instructor and the opportunity for face-to-face interchange

2 In a "mediated" situation such as over television, from a tape or cassette, etc.

3 A combination of face-to-face and mediated situations

21 If there were a charge for taking a course you wanted, how much would you be willing to pay?

_____ per course

_____ per credit hour

_____ per week

_____ per month

_____ per year

22 How would you pay the amount you indicated?

A from your current income

B from savings or other assets

C from additional employment you would take on

D from borrowing

E from some other form of financial assistance like a scholarship or grant

(23) From what kind of organization would you most prefer to take a course or participate in a learning activity?

A private instructor/tutor
B local elementary or secondary school
C public two-year college
D public four-year college
E public university
F private college or university
G church, synagog, or other religious organization
H library or museum
I employer
J labor union or trade association
K other civic, social, or voluntary association

(24) Which of the following factors would be important to you in deciding where you would take a course or get a learning opportunity?

A the academic reputation
B the kinds and numbers of courses offered
C what former students said about it
D what teachers or friends said about it
E What a counselor said about it
F What my employer thought about it
G How much it cost
H How much financial assistance was available if I went there
I Its social reputation
J It was close to my home
K It was in a different location
L The kinds of services it provided in addition to the course
M There were people there I could identify with
N It was small and intimate
O It was large and anonymous
P It was the only place where the opportunity to take a course was conveniently available to me

25. Additional questions may have been added to this printed form by your college. If you have been asked to answer additional questions, please use the boxes below to record your responses.

A	B

C D E F G H I J K

L M N O

Please use the space below for any comments you have about our college, this questionnaire, or anything else you care to share with us.

Please see the instructions before completing items (26) through (29)

(26) Social Security Number _____

(27) Name

_____ _____ _____

Last First Middle

(28) Current address

_____

Number, street, apartment, unit, etc.

_____ _____

City State

(29) Telephone number

_____ _____

Area code Number

SAMPLE: INSTRUMENT B

COMMUNITY NEEDS ASSESSMENT

PURPOSE: To Assess the Needs of Community Agencies and Organizations

1. What type of organization do you represent?

A Religious organization
B Library
C Museum
D Labor union
E Professional/trade organization
F Civic organization
G Voluntary organization
H Fraternal organization
I Foundation
J Social or community organization

2. What percentage of your membership/constituency are

A
____% Male
____% Female

B
____% American Indian or Alaskan Native
____% Asian, Pacific Islander, or Filipino
____% Black or Afro-American
____% Hispanic, Chicano, or Spanish-speaking American
____% White or Caucasian

C
____% Under 18
____% 18 to 22 years
____% 23 to 25 years
____% 26 to 30 years
____% 31 to 40 years
____% 41 to 50 years
____% 51 to 60 years
____% 61 years or older

(3) What is the Postal Service Zip Code at the place where your organization has its primary headquarters or office

(4) How would you describe the needs of your membership/constituency for education or training activities which would help them achieve each of the following goals?

	------This is a need of our membership which----------					This is not a need of our membership
	Our organization is meeting		Some other organization is meeting		Is not being met	
	Fully	Partially	Fully	Partially		
To increase their knowledge in an academic field	☐	☐	☐	☐	☐	☐
To obtain degrees or certificates	☐	☐	☐	☐	☐	☐
To complete courses necessary for admission to a four-year college or university	☐	☐	☐	☐	☐	☐
To discover their career interests	☐	☐	☐	☐	☐	☐
To formulate long-term career plans or goals	☐	☐	☐	☐	☐	☐
To prepare for new careers	☐	☐	☐	☐	☐	☐
To improve their knowledge, technical skills, and/or competencies for their current jobs or careers	☐	☐	☐	☐	☐	☐
To increase their chances for raises or promotions	☐	☐	☐	☐	☐	☐
To become active in student life or campus activities	☐	☐	☐	☐	☐	☐
To increase their participation in cultural or social events	☐	☐	☐	☐	☐	☐
To meet people	☐	☐	☐	☐	☐	☐
To increase their self-confidence	☐	☐	☐	☐	☐	☐
To improve their leadership skills	☐	☐	☐	☐	☐	☐

(membership/constituent needs, continued)	This is a need of our membership which: Our organization is meeting Fully	Our organization is meeting Partially	Some other organization is meeting Fully	Some other organization is meeting Partially	Is not being met	This is not a need of our membership
To improve their ability to get along with others	☐	☐	☐	☐	☐	☐
To learn skills which will enrich their daily lives or make them more complete persons	☐	☐	☐	☐	☐	☐
To develop their abilities to be independent, self-reliant, and adaptable	☐	☐	☐	☐	☐	☐
To become better parents	☐	☐	☐	☐	☐	☐
To deal better with brothers and sisters	☐	☐	☐	☐	☐	☐
To learn how to solve family problems	☐	☐	☐	☐	☐	☐
To cope with aging parents	☐	☐	☐	☐	☐	☐
To manage home finances better	☐	☐	☐	☐	☐	☐
To become better homemakers	☐	☐	☐	☐	☐	☐
To improve their marriages	☐	☐	☐	☐	☐	☐
To learn more about how to solve community problems	☐	☐	☐	☐	☐	☐
To learn more about community affairs and public issues	☐	☐	☐	☐	☐	☐
To contribute to the government of our town, state, or country	☐	☐	☐	☐	☐	☐
To improve skills in a sport	☐	☐	☐	☐	☐	☐
To learn about a hobby, such as stamp or coin collecting	☐	☐	☐	☐	☐	☐

(membership/constituent needs, continued)	This is a need of our membership which					This is not a need of our membership
	Our organization is meeting Fully	Our organization is meeting Partially	Some other organization is meeting Fully	Some other organization is meeting Partially	Is not being met	
To learn to play a musical instrument	☐	☐	☐	☐	☐	☐
To acquire skill in dancing or acting	☐	☐	☐	☐	☐	☐
To appreciate art, literature, or music more intelligently	☐	☐	☐	☐	☐	☐

5 From this list of needs of your membership/constituency which might be met through education or learning activities, which would you consider to be the three most important? Enter the code of the reason in the box below. For example, if you think their greatest need would be for programs to assist them in learning how to solve family problems enter the code letter "X" in the first box

Most Important ☐ Second most Important ☐ Third most Important ☐

6 How would you describe the needs of your membership/constituency for programs of education or training in each of the following areas?

	High	Moderate	Low	None
(List to come)				

7 From the list of subject areas, which would you consider to be the three most needed by your membership/constituency? For example, if you think that they most need training in the English language enter the code letter "X" in the first box

Most Important ☐ Second most Important ☐ Third most Important ☐

(8) When would it be most convenient for your membership/constituency to participate in education or learning activities?

0 Weekday mornings
1 Weekday afternoons
2 Weekday evenings
3 Anytime during the week
4 Weekends
5 No preference

(9) What time of the year would it be most convenient for your membership/ constituency to participate in educatin or learning activities

0 Spring
1 Summer
2 Fall
3 Winter
4 Year-round
5 Not year-round but no preference

(10) How often would your membership/constituency be able to attend a class or other learning activity?

0 daily
1 four times a week
2 three times a week
3 two times a week
4 once a week
5 twice a month
6 once a month
7 Other _____

(11) Some people prefere intensive time arrangements for classes while others prefer to have them spread over a longer period of time. What would be the preferences of your membership/constituency for courses or learning activities which would require them to attend

	Preferred	Not preferred	No Pre
All day Saturday for six weeks	☐	☐	☐
Two or three weekends	☐	☐	☐
All day for two or three weeks continuously	☐	☐	☐
All day and evening for one or two weeks continuously	☐	☐	☐
All day and evening for three or four days, including one weekend	☐	☐	☐

(12) For how long a period of time would your membership/constituency be able to participate in courses or learning activities?

0 two weeks
1 one month
2 six weeks
3 two months
4 ten weeks
5 three months
6 one quarter
7 one semester
8 one year
9 Other _____

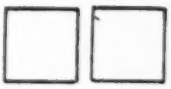
(13) If there were a charge for taking a course they wanted, how much do you think your membership/constituency would be willing to pay?

$_____ per course
$_____ per credit hour
$_____ per week
$_____ per month
$_____ per year

14 What role could your organization or agency play in providing education and learning activities for your membership/constituency? Check all that apply

- ☐ Provide space to offer the program at no cost
- ☐ Provide staff to offer the program
- ☐ Provide mailing lists and access to records to help in publicizing the program
- ☐ Subsidize all of the costs
- ☐ Subsidize part of the costs
- ☐ Not play any role at all

15. Additional questions may have been added to this printed form by your college. If you have been asked to answer additional questions, please use the boxes below to record your responses.



A B C D E F G H I J K

L M N O

Please use the space below for any comments you have about our college, this questionnaire, or anything else you care to share with us.

(16) Agency/organization identification

Name of agency or organization _____

Name of individual completing this survey _____

Title of individual _____

Agency/organization mailing address _____
Number, street, apartment, unit, etc.

_____
City and State

Telephone number _____ _____
Area code Number

SAMPLE: INSTRUMENT C

INSTITUTIONAL NEEDS ASSESSMENT

PURPOSE: To Assess the Capabilities and Resources for a Given PSE Institution

(1) What type of institution do you represent?

0 Elementary or secondary school
1 Single program occupational school
2 Two-year college
3 Specialized or professional institution
4 General baccalaureate college
5 Comprehensive institution
6 Major doctoral granting institution
7 Free university
8 Learning network
9 Educational brokering agency
10 Educational clearinghouse
11 Educational consortium

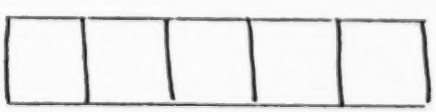
(2) What type of organization is responsible for the governance of your institution?

0 A federal agency
1 A state agency
2 A local governmental agency
3 A private not-for-profit group or organization
4 A private for-profit group or organization

(3) Is your institution legally authorized by the state in which you are located to grant degrees or certificates?

0 Yes
1 No

(4) What is the Postal Service Zip Code at the place where your institution provides most of its classes?



(5) How many individuals received education or learning experiences from your institution last year?

_____

_____

(6) What percent of those individuals were

(A) _____% Full-time for credit
_____% Part-time for credit
_____% Not for credit

(B) _____% Male
_____% Female

(C) _____% American Indian or Alaskan Native
_____% Asian, Pacific Islander, or Filipino
_____% Black or Afro-American
_____% Hispanic, Chicano, or Spanish-speaking American
_____% White or Caucasian

(D) _____% Under 18 years
_____% 18 to 22 years
_____% 23 to 25 years
_____% 26 to 30 years
_____% 31 to 40 years
_____% 41 to 50 years
_____% 51 to 60 years
_____% 61 years or older

(7) What is the total number (FTE) of employees in your institution?

_____ Administrative
_____ Instructional or research professional (line professional)
_____ Support professional (staff professional)
_____ Secretarial or clerical
_____ Other _____

(8) What do you consider to be the "service area" of your institution?

0 National
1 A several-state region
2 A state
3 A several-county region
4 A county
5 A city
6 A geographical area smaller than a city
7 Only our own members or constituents (regardless of geography)

(9) Which of the following kinds of courses does your institution offer? (check all that apply)

0 Basic or general
1 Continuing professional
2 Occupational
3 Family
4 Recreational or leisure
5 Social development
6 Self-development

(10) In which of the following areas do you provide courses?

(list to come)

(11) When do you provide most of your classes?

0 Weekday mornings
1 Weekday afternoons
2 Weekday evenings
3 Anytime during the week
4 Anytime during the week or weekend
5 Only on the weekend

(12) What percentage of your classes/learning activities would be available to students who wanted to attend in the

_____% Spring
_____% Summer
_____% Fall
_____% Winter

13 What percentage of courses/learning activities does your institution normally offer

_____% daily
_____% four times a week
_____% three times a week
_____% two times a week
_____% once a week
_____% twice a month
_____% once a month
_____% Other _____

14 What percentage of courses/learning activities at your institution normally last for

_____% two weeks or less
_____% one month
_____% six weeks
_____% two months
_____% ten weeks
_____% three months
_____% one quarter
_____% one semester
_____% one year or more
_____% Other _____

(15) What percentage of your classes/learning activities are offered

_____% according to a regular schedule

_____% according to student demand

(16) What percentage of your classes/learning activities are offered as

_____% independent study, for example correspondence, home study

_____% directed study, such as tutorials

_____% directed experiential learning, for example apprenticeships, on-the-job training, co-op

_____% self-directed learning, such as do-it-yourself projects

_____% classes

_____% small group meetings such as workshops, seminars, institutes

_____% large group meetings such as conferences, conventions, or lectures

_____% demonstrations

_____% trips or tours

_____% action projects such as working with a committee to solve a community problem, involving students in projects in the community, etc.

(17) What percentage of your classes/learning activities are offered at

_____% main campus

_____% regional learning or extension center

_____% business or industrial site

_____% community center, agency, library, etc.

_____% home

_____% Other _____

(18) What percentage of your classes/learning activities are offered

_____% in a situation where there is a live instructor and the opportunity for face-to-face interchange

_____% in a "mediated" situation such as over television, from a tape or cassette, etc.

_____% a combination of face-to-face and mediated situations

(19) What percentage of those participating in classes/learning activities provided by your institution can live "on campus" in institutionally-owned, operated, or arranged housing?

_____%

(20) Is public transportation to and from your institution available

0 Yes, it is available conveniently
1 Yes, it is available but not convenient
2 No, it is not available

(21) Is parking available at or near your institution

0 Yes, free
1 Yes, metered, hourly rated lots, or similar
2 Yes, on a weekly or monthly basis
3 Generally not available

(22) How much do you normally charge students at your institution for tuition and fees?

$_____ per

- ☐ course
- ☐ credit hour or unit
- ☐ week
- ☐ month
- ☐ semester or quarter
- ☐ year

(23) From which of the following programs can those who take classes/learning activities at your institution receive support? Check all that apply

- ☐ Basic Educational Opportunity Grants (BEOG)
- ☐ Supplemental Educatational Opportunity Grants (SEOG)
- ☐ National Direct Student Loans (NDSL)
- ☐ College Work-Study Employment (CWS)
- ☐ Federally-Insured or Guaranteed Student Loans (FISL, GSL)
- ☐ Veterans Benefits
- ☐ State Scholarships or Grants

(24) Institutional identification

Name of institution _____

Name of individual completing this survey _____

Title of individual _____

Address of institution _____
Number, street, unit, etc.

_____
City and State

Telephone number _____ _____
Area code Number